

# Survey of Client Relations (SCR)

Survey of Client Relations (SCR) measures the skills necessary to build strong client relationships. Effective representatives foster professional, mutually beneficial rapport with customers and other partners. A major aspect of this role is to understand all facets of a client's business and anticipate and respond to their needs. To be successful in the position, a representative must be friendly, motivated and, ultimately, ready to address the demands and concerns of customers as they arise. The SCR supplies feedback on the unique skill set needed to consistently provide a positive client experience.

**APPLICATION**  
Consultative skills development

**RESPONDENTS**  
Self, Manager, Clients, and Associates

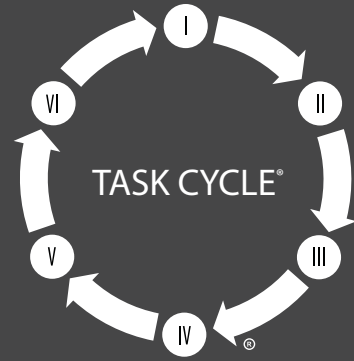
**AUDIENCE**  
Consultants, sales persons, and service & client representatives

**QUESTIONS**  
55 questions, 3 open-ended

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www.PerformancePrograms.com  
surveys@performanceprograms.com  
1-800-565-4223

SCR survey and Task Cycle are intellectual properties of TBC.

## Underlying Model



The Task Cycle is a validated organizing tool that can help leaders know where to focus their development. It is presented as a logical sequence of events, with each phase contributing to achieving the final goal. A leader's performance across the Task Cycle phases is predictive of how others perceive their impact on the organization.

### SCR Leveraging Sequence

1

**ESTABLISHING RAPPORT**  
Understanding the client's business, conveying information clearly, and proactively providing clients with relevant information.

2

**IDENTIFYING CLIENT NEEDS**  
Analyzing and addressing unique client needs.

3

**RESPONDING TO NEEDS**  
Making appropriate recommendations.

4

**GAINING ACCEPTANCE**  
Collaborating in the decision-making process and effectively responding to client concerns.

5

**DRIVE**  
Demonstrating enthusiasm, and appropriately utilizing product and process expertise to get results.

6

**ACKNOWLEDGEMENT**  
Acknowledging positive relationships with partners.

**OUTCOMES**  
Professionalism, Approachability, and Overall Satisfaction are leveraged through the mastery of Task Cycle phases.